ISR Services 2004
Data Collection

Centralized Training
Dallas, Texas
12 – 16 Jan 2004

Installation Services POC

Putting It All Together

Putting It All Together

- **Preparation**
- **Organize the Effort**
- **Collect the Data**
- **QUALITY DATA**
- **Briefing the Commander**

Preparation

- **Attend Centralized/Regional Training**

- **Study the Implementing Instructions**
  - **Learn what is included in the instructions – Service definition, performance measure description, standards, …**
  - **The Services POC is NOT the SME for all data**
  - **Identify any issues/questions and pass to higher HQ for resolution**
  - **Identify the Staff Director/Leader responsible for the staff sections reporting each service/performance measure/data element.**
  - **Identify the source of each data element required to be reported –Who is the SME/action officer who has the data?**
  - **Develop a consolidated data requirements listing for each Staff Director/Leader.**

Preparation (Cont.)

- **Plan Local Training**
  - **Assure understanding of the requirements/process.**
  - **Provide documentation needed from the Implementing Instructions.**
  - **Provide access to prior years' data.**
  - **Provide copy of tasking memorandum.**
  - **Share contact information – possibly set up email group/bulletin board.**
  - **Establish communications links**
  - **Assure understanding of interim reporting process.**
  - **Plan for large group, small group and/or One-on-One sessions as needed**

Preparation (Cont.)

- **Develop data collection plan outline**
  - **Timeline/Milestones**
  - **Process/procedures**
  - **IPRs/Periodic Reports**
- **Schedule meeting with Garrison Commander**

Organizing the Effort

- **Conduct initial meeting with Garrison Commander**
  - **HQDA Tasking Memorandum**
  - **Implementing Instructions – Who is responsible for each performance measure/data element**
  - **Plan to accomplish the data collection - Timeline/milestones, process, …**
  - **Provide draft tasking memorandum from Garrison Commander to staff**
  - **Clarify any desired involvement with mission commander(s)**
  - **Set time to brief staff and tentative IPR schedule**
  - **Establish status report procedures to track progress**

Organizing the Effort (Cont.)

- **Finalize the tasking memorandum and get signed by the Commander.**
  - **Reference the HQDA Tasking Memorandum**
  - **Assign responsibility for each performance measure/data element.**
  - **Establish timeline for data collection.**
  - **Require official appointment of and contact information on action level POCs (Subject Matter Experts [SMEs]) for each data element.**
  - **Identify follow-up interim reporting procedures.**
    - **Periodic updates required from SMEs, even if reporting negative progress.**
    - **Periodic written reports of status to be provided to the Commander and Staff.**
  - **Identify training to be provided to SMEs – request attendance**
    - **Central Training vs. Small Groups vs. One-on-One**

Organizing the Effort (Cont.)

- **Finalize the tasking memorandum to be signed by the Commander (Cont.)**
  - **Identify the process for preparing for and briefing the Commander on the final results for his approval.**
  - **Provide any key instructions from the Implementing Instructions that need emphasis up front (i.e., data to be reported is FY2003 unless otherwise stated, all C3/C4 ratings require comments, overwrite recommendations must be accompanied by recommended comments for Commander's approval,….).**
  - **Identify any supplemental guidance from IMA or Region.**
  - **Be sure to address the Commander's personal guidance as you think it should be and as it fits with his/her command style.**

Organizing the Effort

- **Brief the Garrison Commander and Staff**
  - **HQDA Tasking Memorandum**
  - **Translate into local requirements including final suspense date.**
  - **Outline of your Plan of Action**
  - **Provide signed tasking memorandum from Garrison Commander**
  - **Provide listing of data to be collected within each staff section and the SME you believe to have the required data**
  - **Ask for verification of SMEs and their appointment as POCs within staff sections to coordinate data collection requirements**
  - **Announce IPR Schedules**
  - **Announce status report procedures to track progress**
  - **Clear up any questions and forward issues to higher HQ**
- **Conduct planned training assuring 100% participation**

Collect the Data

- **Set up communications with staff directors/action officers/SMEs**
  - **Periodic email updates**
  - **Review FAQs frequently and provide significant items to appropriate staff directors/action officers/SMEs.**
  - **Facilitate communications between your local SMEs and their counterparts at Region/IMA/HQDA to clarify questions/concerns.**
    - **DO NOT LET SMEs STRUGGLE ALONE – Assisting them to seek guidance from counterparts will make the reporting process easier and more timely as well as assuring the accuracy of the reported data.**
  - **Use your established communications links to be proactive.**

Collect the Data (Cont.)

- **Establish tracking mechanisms to keep apprised of collection status**
  - **Supports preparation of interim status reports.**
  - **Use reports to provide praise for progress as well as to provide motivation for keeping on track.**
  - **Avoid making reports a negative experience only.**
- **Enter data on ISRWeb**
  - **As received – keeps website up to date and reduces possible loss of input.**
  - **In blocks as received – on a scheduled basis, input what has been received; can use web reports to support interim status reporting.**
  - **In total after all is received – minimizes time online and assures that everyone's data appears on the web simultaneously.**

QA/QC of Data

- **Prepare data for QA/QC**
  - **Lay out last three years of data for comparison (use cross walk).**
  - **Include previous ratings results (Color and C-Ratings).**
  - **Identify significant differences for follow-up.**
  - **Compare reported data to related data reported elsewhere.**
  - **Prepare QA/QC packets for SMEs – Staff Directors and Action Officers.**
  - **Get responses to questionable data.**
  - **Obtain explanatory comments as needed and assure they are entered on ISRWeb.**
  - **THIS IS A CRITICAL STEP!!**

Briefing the Commander

- **Lay out the data results**
  - **Use chiclet charts**
  - **Use multi-year displays to identify trends**
  - **Provide “proposed” comments**
  - **Have any related reports that may clarify/justify ISR reported data**

Briefing the Commander

- **Plan the method of briefing**
  - **Consider Commander's preferences**
  - **Possibly use ISRWeb live – works best if Commander is already familiar with ISRWeb**
  - **Use PowerPoint charts – can import all that is needed into PowerPoint**
  - **Involve the Staff**
    - **Conduct pre-briefs with/provide read-aheads for Staff Directors and Action Officers**
    - **Establish SMEs responsibility to answer Commander's questions**
  - **Prepare draft of any recommended overwrite justifications**

Briefing the Commander (Cont.)

- **Conduct Briefing**
  - **Give Commander briefing materials ahead of time so he can review and prepare prior to briefing**
  - **Assure that SMEs attend – preferably Staff Directors and their Action Officers**
  - **Concentrate on briefing results – Go to detailed data level only as the Commander desires**
  - **Use SMEs to answer and clarify issues for the Commander**

Briefing the Commander (Cont.)

- **Conduct Briefing (Cont.)**
  - **Assure Commander sees and approves comments and overwrites**
  - **Have Commander sign the ISR Summary Report or schedule a time after requested adjustments for signature**
  - **Upon Commander's approval, assure online data approval process is completed**
  - **Initial report is complete – GREAT JOB!!**

Don't think this is the end – you must support inquiries as each level conducts its QA/QC!!!